Montana Office of Public Instruction
Direct Certification Application
CRM User Guide

Contents

Terminology

Terminology Key

	Seen on District/Schools Record Type		Seen in Advanced Find		Seen on Views
	Seen on People Record Type		Seen in Link Student Window		Seen on Notifications
	Seen on Sources Record Type				

	30 Day Grace: If the student is no longer directly certified, this field represents a yes (if checked)/no (if unchecked) as to whether they are in their 30 days grace period after becoming uncertified.
	Active Eligible Sources: This view will display all eligibility source record where the ages are considered to be automatically matched. This is the view used in the dashboard.
	Active Sources: This view will display all eligibility source records that are active.
	Advanced Search: Available in the Link Student window, the Advance Search feature allows users to search by additional criteria such as First Name Begins With, Last Name Begins With, Date of Birth or Source ID.
	Audit Confidence: The confidence score (provided by the InRule application) that specifies how confident it is that the eligibility source record is the same student as the person record when the Audit Match is run.
	Audit Confidence Match Reason: Scores and reasons that contribute to the overall Audit Confidence score when the Audit Match is run (such as **Name Match**, **Date of Birth Match**, and **Gender Match**) between a person and a linked eligibility source record.
	Audit Date First Matched: This field displays the first date that the audit match process linked a person record to eligibility source.
	Cases: Cases tie all parts of the HHS data together. Individual data pieces make up the case (such as programs, parent/guardians, addresses) and then cases are related to eligibility sources.
	Confidence: The confidence score (provided by the InRule application) that specifies how confident it is that the eligibility source record is the same student as the person record.
	Confidence Reason: Scores and reasons that contribute to the overall confidence score (such as **Name Match**, **Date of Birth Match**, and **Gender Match**) between a person and eligibility source record.
	Date of Birth Match: Score formulated from an exact match on Date of Birth between a person and eligibility source record.
	Date First Matched: Date first matched to an eligibility source.
	Direct Certification: The student is within the eligibility period for SNAP, TANF, or manual certification.
	End Date: End date of direct certification within current school year.
	Execute Direct Certificate Service on Load: A field that automatically gets set when users manual certify a person record that tells CRM to verify if the student is now directly certified or not, and to then update the student record.
	Fuzzy Name Match: A Fuzzy Name Match will attempt to match a person record to an eligibility source record based on similar sounding names as well as names that are somewhat or almost a match.

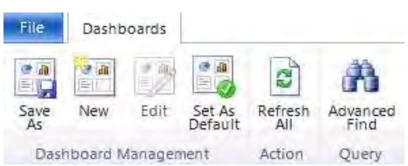
	Higher Confidence Match: This field is checked after a Match Audit is run if there is a higher confidence score than what was originally set but the nightly automated process.
	Inactive Districts/Schools: This view will display district or school records that are automatically marked as inactive in the system when they are removed from the list of active schools that are queried nightly.
	Inactive People: This view will display people records that are automatically marked as inactive when the enrollment end date is prior to the current date
	Inactive Sources: This view will display eligibility source records that are disabled. Only possible if someone manually disables a record.
	Invalid Links: Through the Link Student process, a potential eligibility source was manually flagged as invalid and added to a list so that the person and eligibility source pair would not be presented as potential matches in the future.
	Invalid People: See **Invalid Links**.
	Last Updated: Date the eligibility program was last updated by the automatic job.
	Link Established: Can be either automated or manually depending on whether the link to the eligibility source was created by the nightly automated process or manually.
	Link Student: Process to manually link a Person record to an eligibility source.
	Lunch Participation Type: Field pulled from AIM database.
	Manual Certification: Manually directly certifying a student who doesn't have an active SNAP or TANF eligibility.
	Manually Cleared: Eligibility source record was manually removed from the AIM student record.
	Match Audit: Manual audit of all student records that are linked to an eligibility source.
	Match Status: Field available in the Advanced Find criteria that can be used to verify if a person record has been matched with an eligibility source.
	Multiple Confident Matches: Person records that have two or more eligibility source records that have a confidence of 50 or higher and aren't already linked to an eligibility source.
	Name Match: Score formulated from Exact Last Name, Exact First Name, Fuzzy First Name and Fuzzy Last Name match between a person and eligibility source record.
	Newly Certified Student: Student records certified within the past week, seen on weekly notifications.
	OPI Review: Notification to flag a student record for OPI review is created and sent to the School Authorizer as determined automatically by the OCI Security Role.
	Original Certification Date: Date originally first directly certified.
	Parents/Guardians: Parent or Guardian records that are associated to the eligibility source records.
	Programs: Eligibility programs such as SNAP or TANF.
	Potential Match: Person records that have one or more eligibility source records that have a confidence of 50 or higher and aren't already linked to an eligibility source.

	Record Type: Various records available in CRM such as student records called **People**, **District/School** records, and Eligibility Sources records called **Sources**.
	Refine Search Criteria: Available in the Link Student window, the refine search criteria allows users to modify search criteria such as Include Linked records and Confidence Greater Than. The search for matches takes all of the items in this criterion into account when making the match. The user may need to lower the Confidence Greater Than score to display the matching eligibility source.
	School Review: Notification to flag a student record for School review is created and sent to the School Authorizer as determined automatically by the OCI Security Role.
	Site: Refers to a School.
	SNAP Program Start Date: Eligibility start date for the SNAP Program.
	SNAP Program End Date: Eligibility end date for the SNAP Program.
	Source: This field will display the eligibility program if directly certified and matched (SNAP, TANF, Manual – field only displays fist program found and in that order).
	Source: Eligibility Source field that contains the link located under the Sources section.
	Sponsor: Refers to a School District.
	Start Date: Start date of direct certification within current school year.
	TANF Program Start Date: Eligibility start date for the TANF Program.
	TANF Program End Date: Eligibility end date for the TANF Program.

Navigation

1. Ribbon

The ribbon is the primary location for controls that will help users perform actions throughout CRM. The ribbon automatically adapts buttons and tabs on each screen that are specific to the record type and the ribbon options are varied based on your actions. For instance, some buttons are greyed-out until you make a selection. Once you make a selection, they become active.



2. Home button, Recently visited folder

Home button:  Click this button anytime to return to the CRM landing page (as defined by user)

Recently visited folder:  Allows the user to see the most recently visited records and views. Click on the item from the drop-down menu and it will open the record. Click the pin to keep it permanently in the folder.

3. CRM Navigation Pane

The Navigation Pane is where the user will select various links to navigate between record types within CRM (such as **People**, **District/Schools**, and eligibility **Sources**)

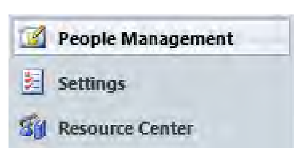
4. CRM Modules

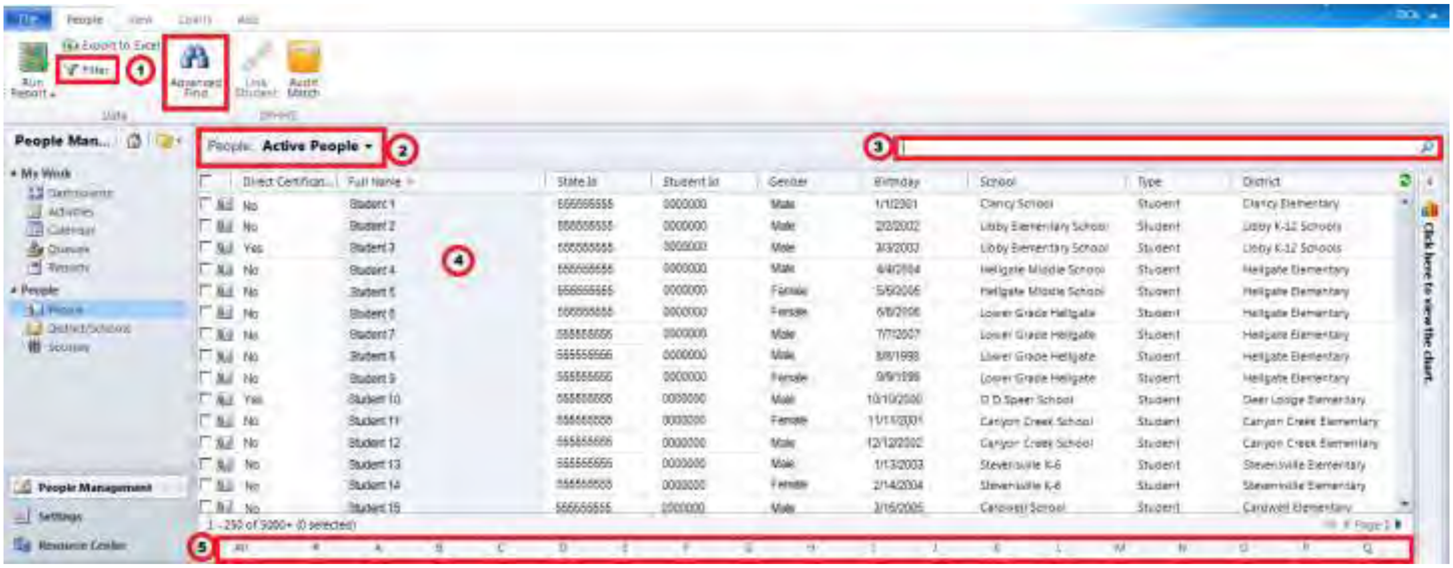
The records in CRM are grouped into modules such as:

People Management: this includes record types such as **People**, **District/Schools**, and eligibility **Sources**

Settings: provides administrator users with access to the CRM customization and configuration settings

Resource Center: provides the user with a link to the Microsoft Dynamics CRM Customer Center





1. Filter, Advanced Find, Sorting

Filter: Allows for filtering of the column headings in the view. Click the **Filter** button again to turn it off

Sorting: Click on a column header to sort List pane A-Z; click a second time to sort Z-A. A grey triangle denotes that a column is configured for sorting.

Advanced Find: Opens a new window that allows the user to build queries

2. View Selector

Is a dropdown menu that allows users to toggle between different views for a record type. **Views** are saved queries that retrieve data by using specific pre-defined filter criteria.

The View Selector contains both **System** and **Personal Views**.

System Views are created by the System Administrator and are accessible to all CRM users

Personal Views are created by and only accessible to the user

3. Quick Search

Use this search box to search for a specific record. It will search on fields defined by the administrator (see search fields below).

The asterisk (*) can be used as a wildcard in the search. Used it in front (*X), in back (X*) or on both sides (*X*) of your search phrase

4. List pane

Where the list of records are displayed that correspond to the view or the search.

5. Index

The alphabetical index lets the user jump to records starting with a particular letter or number

The following **Quick Search** fields are searchable:

On the **Person** record:

- Full Name (Last Name, First Name)
- State ID

On the **District/Schools** record:

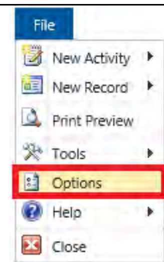
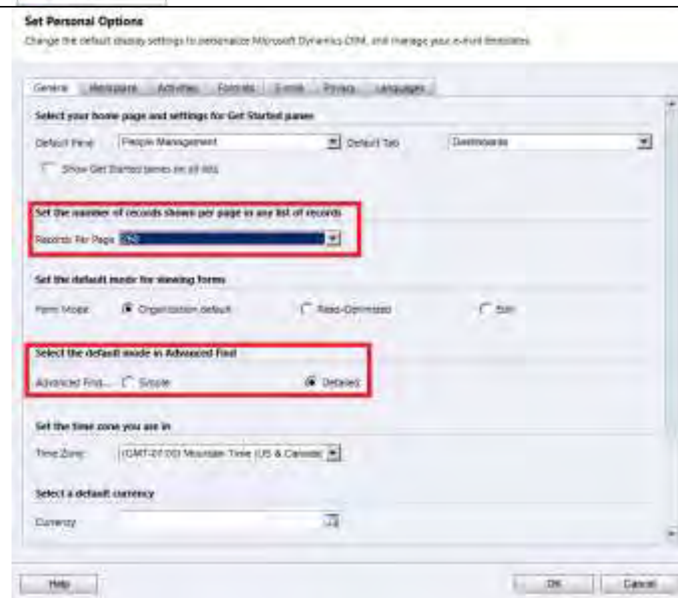
- Name
- Site/Sponsor Number

On the eligibility **Sources** record:

- Last Name
- ID

Personal Settings

Personal Settings is one of the many features inside CRM that allow users to personalize CRM to accommodate your personal preferences.

1. To access Personal settings, click on the **File** tab and then select **Options**	
2. On the **Set Personal Options Window**, the users are recommended to change the following settings that are located on the General tab: • Set the number of records shown per page in any list of records to 250 • Select the default mode in Advanced Find as Detailed • Click **OK** to save your changes.	

Managing Records

How to Find Things in CRM

Users have several options to choose from when trying to locate specific information in CRM such as:

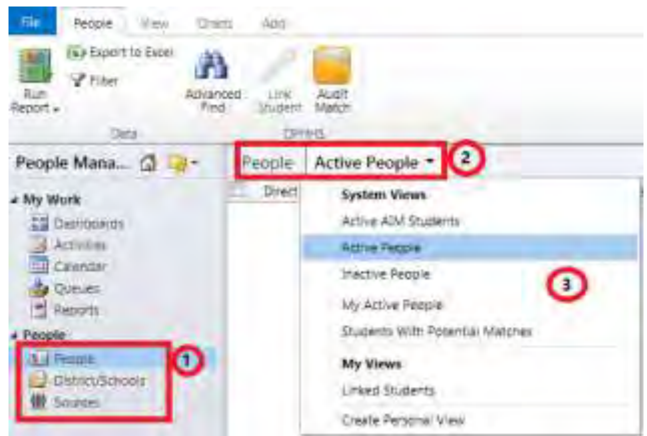
Views	Sorting	Advanced Find
Filters	Quick Search	

Views

Users can use the **View Selectors** to toggle between pre-defined queries (known as **Views**) in the **Person**, **District/School**, and **Source** record type

1. Select a **Person**, **District/School**, or **Source** record type from the left Navigation Pane
2. Click on the View Selector to display a drop-down list of **System** and **Personal Views**
3. Make a selection from the drop-down list

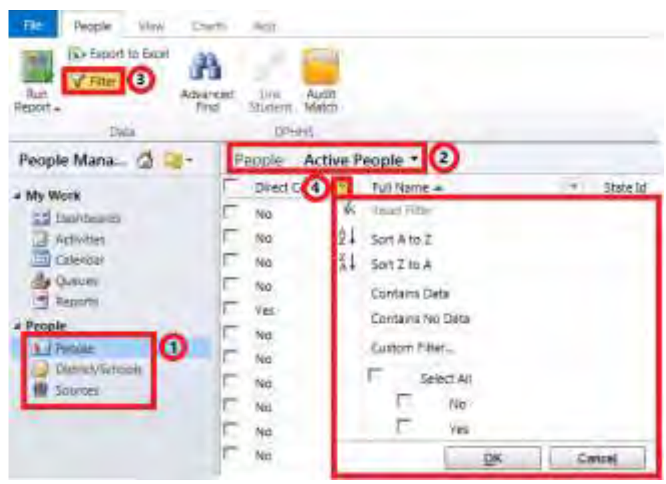
- Once a **View** has been selected, CRM queries the record type based on the pre-defined filter criteria and displays the results in the **List Pane**.



Filters

Users are able to filter Views, much like filtering a table in Excel, in order to narrow down the records returned in a given List Pane.

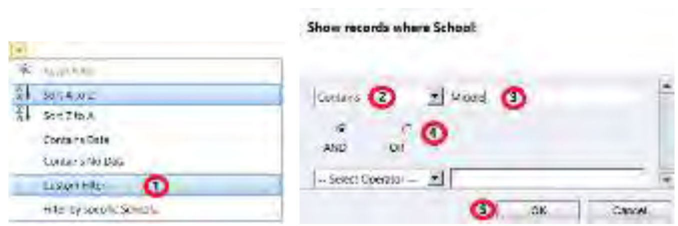
1. Select a **Person**, **District/School**, or **Source** record type from the left Navigation Pane
2. Optionally, use the View Selector to choose a different System or Personal View
3. Click on the **Filter** button on the top ribbon to add a **Filter Options Menu** button ▾ to each column header in the List Pane
4. Users can select one or more filter options in the drop-down menu or choose to create a **Custom Filter** (*See Creating a Custom Filter*). Note: It is possible for users to filter more than one column at the same time.
5. To turn a filter off, click the **Filter** button on the ribbon



Creating a custom filter

From the **Filter Options Menu** button ▾ on the column header:

1. Select **Custom Filter**
2. Select an **Operator**
3. Enter a Value
4. Optionally, using the **AND/OR** radio buttons, user are able to create a custom filter with two criteria values
5. Click **OK**



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Sorting

1. Click on a column header to sort List pane A-Z; click a second time to sort Z-A.

A grey triangle displayed in the column header denotes that a column is configured for sorting.

- ▲ Column sorted A-Z
- ▼ Column sorted Z-A

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Quick Search

The **Quick Search** feature allows users to search for records by using keywords or wildcard characters.

1. Click in the **Quick Search** box and enter a search phrase

- For the times when users don't know the exact value they are searching for, they can use an asterisk (*) as a wildcard character in the search phrase. (For example: *Student Name or Student Name* or *Student Name*)

2. Press **Enter** on the keyboard or click on the Search icon 🔍 to begin searching

- Search results are displayed in the List Pane

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The following **Quick Search** fields are searchable:

On a **Person** record:

- Full Name (Last Name, First Name)
- State ID

On a **District/School** record

- Name
- Site/Sponsor Number

On an eligibility **Source** record:

- Last Name
- ID

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Advanced Find

The **Advanced Find** function is a flexible way for users to extract the data they want to focus on from the rest of CRM while also allowing them to filter out the unnecessary data.

Advanced Find works using a fairly simple formula; users tell it what to look for, and then tell it how to filter what it finds.

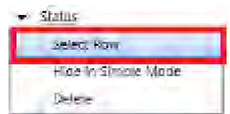
1. Click on the Advanced Find button located on the ribbon. Note: Regardless of where users navigate in CRM, the Advanced Find tool is usually the last icon available on the ribbon.
2. In the **Look for** drop-down menu, select the record type that you want to look for or type of list you want to return (such as: People or Sources)
3. Optionally, the user can select an existing view (such as Active People) in the **Use Saved View** drop-down menu to easily add some pre-defined filtering criteria

- The user can also manually create filtering criteria. Each filter has three parts: a Field, an Operator, and a Value.

4. Click **Select** in the Filtering Criteria area to display a list of all available fields for the record type; scrolling to the bottom of the list the user is also presented with a list of **Related** records that are correlated to the record type selected in the **Look for** drop-down menu. (Note: If you do not see Select available, you may need to click the **Details** button on the ribbon before beginning.) The user will make a selection from the list of available fields or related records.
5. After the user selects a field, the **Operator** appears. The default Operator is "Equals". Optionally, the user can click on the Operator field to display a dropdown list of additional values and make a selection. Note: Depending on the field users selected in the previous step, the possible Operators available can differ.
6. The user will then click in the "Enter a Value" field to enter a value for the criteria. Note: Users are often presented with a lookup icon or ellipse button at the end of the field to assist in entering this value.

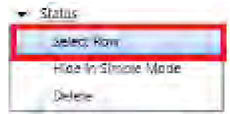
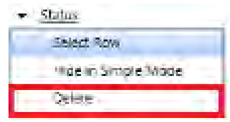
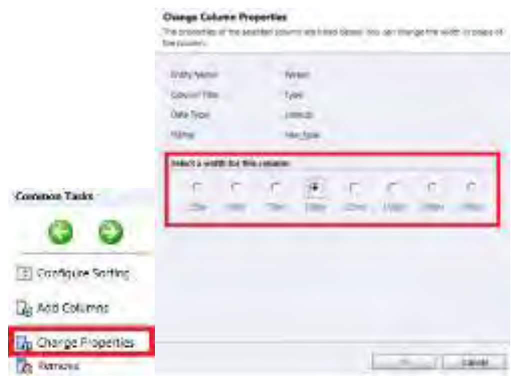
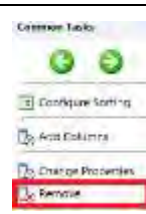
- Additionally, users can **Group Criteria**. To group search criteria, user must select two or more rows for the same record type then click on the **Options Menu** button ▼ next to the search criteria row, click **Select the Row** next, and then click either Group AND / Group OR buttons on the ribbon to group the criterion.

7. When finished, the user will click on the **Results** button on the ribbon to display the query results.



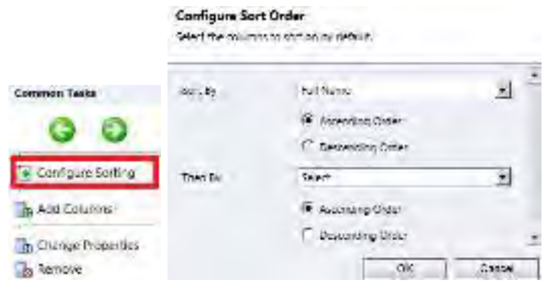
Click on the **Options Menu** button ▼ to select a row

Additional Features Available in Advanced Find

Group Criteria: To group search criteria, a user must select two or more rows for the same record type then click on the **Options Menu** button ▼ next to the search criteria row, next click **Select Row**, and then click either Group AND / Group OR buttons on the ribbon to group the criterion.	 Click on the **Options Menu** button ▼ to select a row then click the Group AND/OR buttons on the ribbon
Delete a row of search criteria: Click on the **Options Menu** button ▼ next to the search criteria row and then click **Delete**. In the confirmation message, click **OK**.	 Click on the **Options Menu** button ▼ to delete a row
Specify the columns to include in the search results: Click the Edit Columns button on the ribbon • In the Edit Column Window click **Add Columns** on the Common Tasks menu bar • In the popup window, select the **Record Type** that contains the columns that you want to include, and then place a checkmark next to the columns you want to add. Click **OK**.	 Click **Add Columns** and then select columns to be added
Adjust the width of a column: Click the Edit Columns button on the ribbon • Click the column you want to adjust the width for and then on the Common Tasks menu bar click **Change Properties** • In the popup window select a width, and then click **OK**.	 Click **Change Properties** and then select new width
To reorder columns: Click the Edit Columns button on the ribbon • Select a column, and then on the Common Task menu bar use the **green arrow** buttons to move it to the left or right	 Select a column then use the green arrows to reorder
To remove a column: Click the Edit Columns button on the ribbon • Select a column and then on the Common Task menu bar click **Remove**	 Select a column then click **Remove** to remove it

Specify the column sort order: Click the Edit Columns button on the ribbon

- On the Common Task Menu bar, click **Configure Sorting**
- In the popup window, specify the columns to sort on and the sort order. Click **OK**. Note: You can only sort on columns from the primary record type



Click **Configure Sorting** and then select columns to sort and sort order

Save Advanced Find search as a Personal View

Saving an Advanced Find query allow users to create personal views to meet their needs and preferences. Personal Views are accessible to the user from the record type View Selectors as well as for use in future Advanced Find queries in the **Used Saved View** drop-down menu.

1. From the Results screen, the user will click on the **Advanced Find** tab
2. Click the Save As button on the ribbon
3. In the pop-up window, enter a **Name** for the view (and optionally a short description). Press **OK.**
4. Your saved personal view is now available in the View Selector listed under **My Views** and in the Advanced Find **Use Saved View** drop-down menu.

Set a Personal View as your default view

When you set a Personal View as your default view, it means whenever you navigate to a record type (**Person**, **District/School**, or **Sources**) that you commonly access, you don't have to wait for the system default view to load and then choose another view

1. Use the View Selector to select the Personal View that you want to use as your default view
2. Click on the **View** tab
3. Then click the button on the ribbon

Person Records

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Display and open active People (student) records assigned to your school and/or district

1. On the left Navigation Pane, click **People** to display a list of students records pre-filtered by the view selected in the View Selector
2. Double click on an individual record (avoiding any hyperlinks) to open from the List Pane

- Note: The following fields are displayed in the Person record header:
  - State Id, Student Id, Direct Certification (Yes/No)
- The following AIM Student data is displayed under the **General** section of a Person record:
  - First Name, Middle Name, and Last Name
  - Type (Student) and Source (AIM, Central, CNP, Home Schooled, or Private School)
  - Birthday, Gender, Age, and Race
  - District, School, Enrollment Start Date, Enrollment End Date, and Grade

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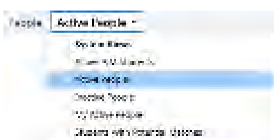
Display and open alternative People views

Such as Active AIM Students, Students with Potential Matches or Inactive People

1. On the left Navigation Pane, click **People** to display a list of students records pre-filtered by the view selected in the View Selector
2. Use the View Selector to change the current People view



3. Double click on an individual record (avoiding any hyperlinks) to open from the List Pane

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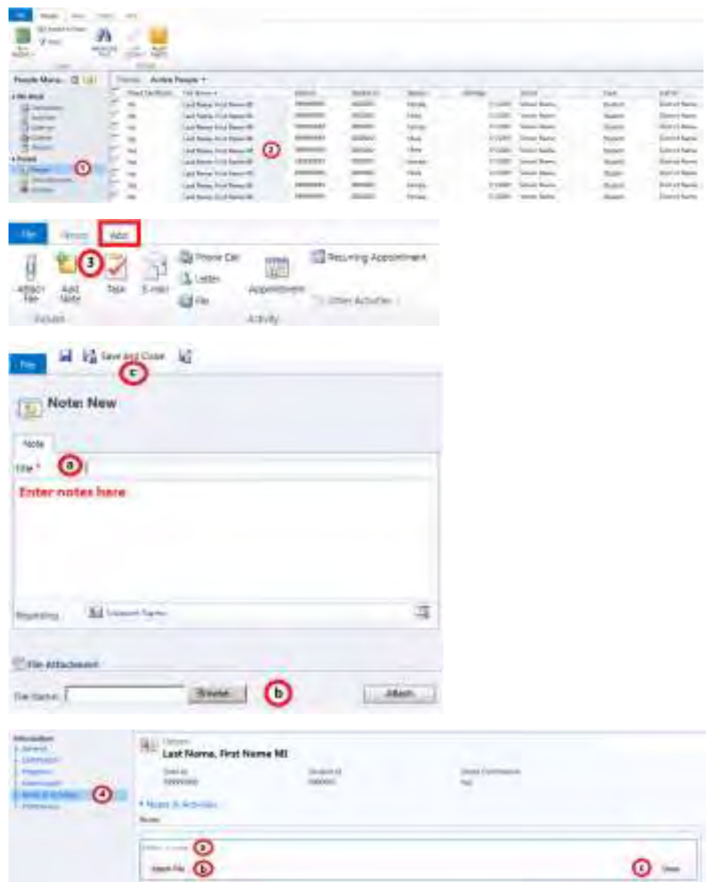
Add a Note to a Person record

Users can add a Note to the Person record two different ways:

1. On the left Navigation Pane, click **People** to display a list of students records pre-filtered by the view selected in the View Selector
2. Double click on an individual record (avoiding any hyperlinks) to open from the List Pane
3. Click on the **Add** tab and then click on the **Add Note** button on the top ribbon
   a. A new Note window will appear, enter a **Note Title** and then enter notes in the space provided below
   b. The user can optionally attach a file to the note
   c. When finished, the user will click **Save and Close** at the top of the window
4. Also from the Person record, the user can select **Notes & Activities** from the left Navigation Pane
   a. Under the **Notes** section, click on "**Enter a Note**" and the user can start typing notes directly in space provided
   b. The user optionally can click **Attach File** to attach a file to the Note
   c. When finished, the user will click **Done**

Note: The notes entered by the user will populate the Notes field on the Student record in the Notes & Activities section. The most recent note will be placed at the top of the box. Each Note will capture the user name that created it as well as the date and time it was created.



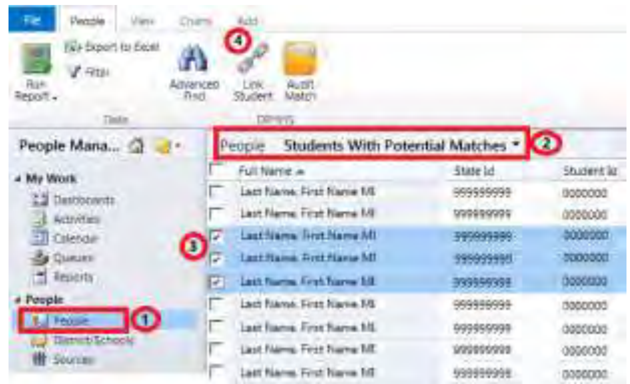
Manually link a Person record to an eligibility Source record

1. On the left Navigation Pane, click **People** to display a list of students records pre-filtered by the view selected in the View Selector
2. Use the View Selector to select People | Students With Potential Matches
3. Select an individual record by placing a checkmark next to the row; or select multiple records using the CTRL or SHIFT key
4. Click on the **Link Student** button on the top ribbon
5. Reviewing the Potential Eligibility Records and if necessary, click on the blue information icon to review additional information about the confidence scoring
6. Optionally, modify the **Refine Search Criteria** features and click **Apply** to apply different filters to the search criteria for potential eligible source records
7. Optionally, click **Advanced Search**, complete appropriate fields and click **Apply** to search potential eligible source records by additional search criteria
8. Click on the green plus icon to link the Person record to the eligibility Source record
9. Click **OK** on the popup message: "You are about to link and Eligibility Source record to the above student. Are you sure you want to continue."
10. An additional popup message states "Link Created." If more than one student was selected it will also say "The next student will be displayed". If no additional students were selected, it will say "No more students exist. This window will be closed"

Note: If the Student and Eligibility Source record were linked:

- The user can open the Person record from the List Pane and
  - The matched eligibility source will be shown as a hyperlink in the **Source** field
  - The **Confidence** (score), **Date First Matched**, and **Confidence Reason** will automatically be filled in with data from the Link Student window
  - **Link Established** field will be set to Manual

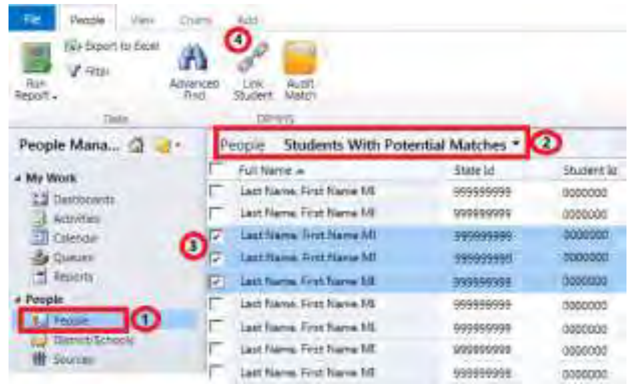
- The user can click on the hyperlinked eligibility source in the **Source** field of the Person record to display the eligibility Source record. The user is then able to display all associated Person records by clicking on People from the left Navigation Pane of the Source record



Manually invalidate an eligibility Source record as a potential match to a Person record

1. On the left Navigation Pane, click **People** to display a list of students records pre-filtered by the view selected in the View Selector
2. Use the View Selector to select People | Students With Potential Matches
3. Select an individual record by placing a checkmark next to the row; or select multiple records using the CTRL or SHIFT key
4. Click on the **Link Student** button on the top ribbon
5. Reviewing the Potential Eligibility Records and if necessary, click on the blue information icon to review additional information about the confidence scoring
6. Optionally, modify the **Refine Search Criteria** features and click **Apply** to apply different filters to the search criteria for potential eligible source records
7. Optionally, click **Advanced Search**, complete appropriate fields and click **Apply** to search potential eligible source records by additional search criteria
8. Click on the red remove icon to invalidate the eligibility source record as a potential match for the Person record
9. Click **OK** on the popup message: "You are about to invalidate an Eligibility Source as a potential match. Are you sure you want to continue."
10. An additional popup message states: "Link Invalidated. This record will not be displayed on the Potential Eligibility Records list unless the 'Show Invalid Links' is checked."

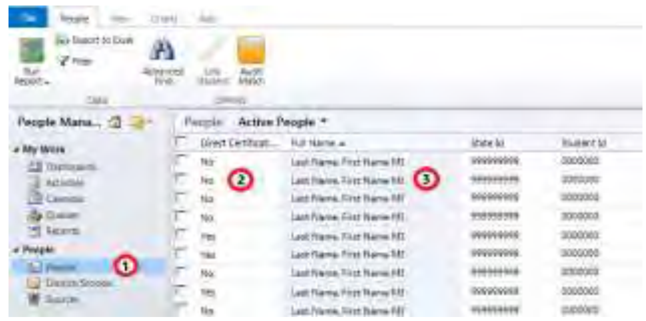
- Note: The status of the Potential Eligibility Record in the Link Student window will automatically be updated with an invalid link icon. If the eligibility Source was invalidated as a potential match for a student:
  - From the Link Student window, the user can click on the Eligibility Source record and then select Invalid People from the left Navigation Pane to view the Person record that is no longer a potential match
  - The user can also open the Person record from the List Pane and select Invalid Links from the left Navigation Pane to display the eligibility Source that was marked invalid in the previous steps.



Manually Direct Certification a Person record

1. On the left Navigation Pane, click **People** to display a list of students records pre-filtered by the view selected in the View Selector
2. Locate a record that is not already directly certified (has a “No” in the Direct Certification column on the List Pane)
3. Double click on an individual record (avoiding any hyperlinks) to open from the List Pane
4. Select **Certification** from the left Navigation Pane
5. Under **Manual Direct Certification**, place a check mark in the **Manual** field
6. Next, enter a **Start Date** and (if available) an **End Date**
7. Click on the lookup icon to select a **Reason Code**
8. Enter a note in the **Reason** field
9. Lastly, click the **Save** button on the top ribbon

- Note: Upon clicking **Save**, CRM will automate the following actions:
- Under **Direct Certification**:
  - The **Direct Certification** field will automatically receive a checkmark
  - The **Source** field will automatically be completed with Manual
  - The **Original Certification Date** will be completed with the Start Date entered in the steps above
  - The **End Date** field will be completed with the current school year
- During the nightly automated process, CRM will try to match this Person record to an eligibility Source record. If one is found, the **Sources** section will be automatically completed by CRM and be displayed to the users the following day

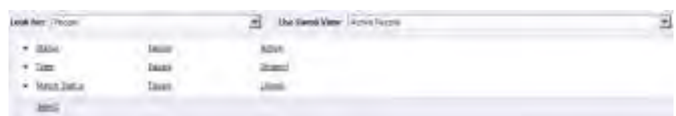


Manually remove an eligibility Source that is matched to a Person record

1. On the left Navigation Pane, click **People** to display a list of students records pre-filtered by the view selected in the View Selector
2. Double click an individual record that has already been matched to eligibility source record, avoiding any hyperlinks, to open from the List Pane (Note: User may need to use an **Advance Find** query to locate records Linked records; see right for Advanced Find search criteria)
3. Click the **Remove Source** button on the top ribbon
4. Click **OK** on the popup message: “Would you like to make an invalid link on this pair?”
5. Use the lookup icon to select a **Reason** under the Manually Cleared section of the Student record
6. Click the **Save** button on the top ribbon

- Note: The user can select Invalid Links from the left Navigation Pane of a Person record to display the eligibility source that was marked invalid in the previous steps.
- In the List Pane, the user can select the person record by putting a check mark next to the record and then click on the **Link Student** button on the top ribbon, the eligibility source invalidated in the previous step will have an Invalid Link icon in the status listed for the Potential Eligibility Record.

Advanced Find search criteria that can be used to located matched Person records:



Flagging a Person record for OPI Review or School Review

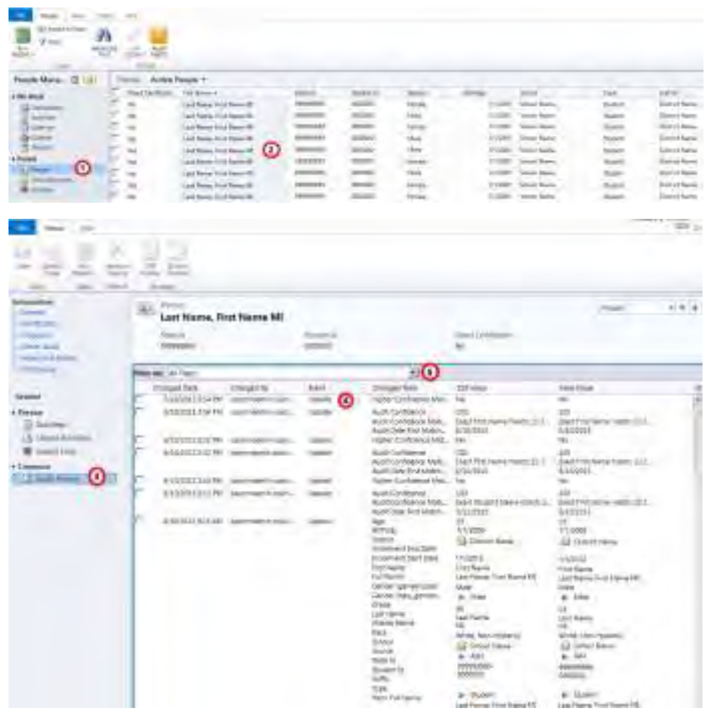
1. On the left Navigation Pane, click **People** to display a list of students records pre-filtered by the view selected in the View Selector
2. Double click on an individual record (avoiding any hyperlinks) to open from the List Pane
3. The user will click on the OPI Review or School Review button on the top ribbon
4. Click **OK** on the popup message: “Are you sure you want to create an OPI Review (or School Review) for this person?”
5. Click **OK** on the second popup message: “OPI Review/School Review created.”

Note: The School Authorizer will receive a notification activity that the Person record has been flagged for review.

Audit History – view changes on a Person record

The **Audit History** function will keep a running history of each change made to a field within a record type. Note: When multiple fields are updated at the same time, they will show up under the same Audit record.

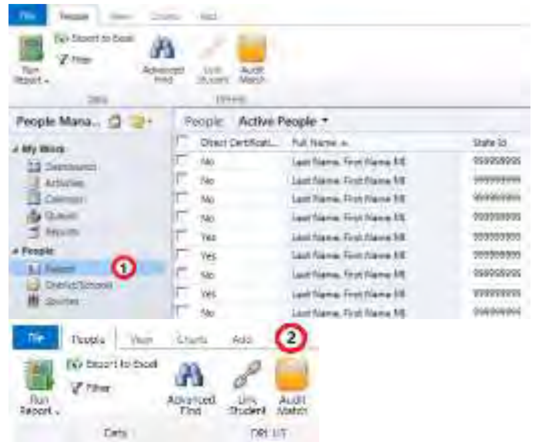
1. On the left Navigation Pane, click **People** to display a list of students records pre-filtered by the view selected in the View Selector
2. Double click on an individual record (avoiding any hyperlinks) to open from the List Pane
3. Select **Audit History** from the left Navigation Pane
4. Optionally, double click on the audit record to display expanded details of the audited changes
5. Optionally, use the **Filter on** drop-down list to filter audit records for a particular field.



Manually run the Audit Match process

The automated **Audit Match** process typically occurs during a nightly batch process. If you have made several changes throughout the day in the system, you are able to refresh the **Audit Match** process by running manually.

1. On the left Navigation Pane, click **People** to display a list of students records pre-filtered by the view selected in the View Selector
2. Click on the **Audit Match** button on the top ribbon
3. Click **OK** on the popup message: “Are you sure that you want to run an audit on all students that are linked to an Eligibility Source record?”
4. Click **OK** on the second popup message: “The background audit process has been started.”



District/School Records

Display and open various district/school views

Such as Active Districts/Schools (Default View), Active Districts, Active Schools, Inactive Districts/Schools

1. On the left Navigation Pane, click **District/School** to display a list of district and/or school records pre-filtered by the view selected in the View Selector
2. Use the View Selector to change the current District/School view
3. Double click on an individual record (avoiding any hyperlinks) to open from the List Pane

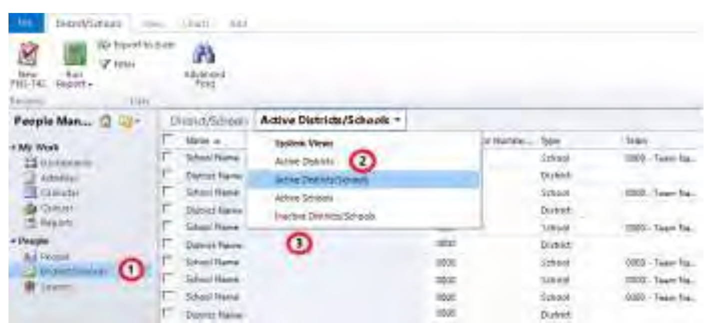
- Note: The following fields are displayed in the District/School record header:
  - Type (school or district), Site/Sponsor Id, Site/Sponsor Number
- The following fields are displayed in the District/School record General Section:
  - Name, District (if applicable), Ref description, County, District Code, and School Code

Open and display a District/School record from a Person record

1. On the left Navigation Pane, click **People** to display a list of students records pre-filtered by the view selected in the View Selector
2. Double click on an individual record (avoiding any hyperlinks) to open from the List Pane
3. Under the School Information section, click on the **District** and/or **School** hyperlink

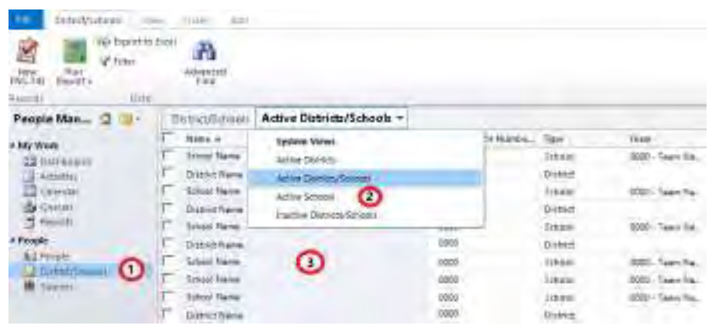
Display School records that are associated with a District record

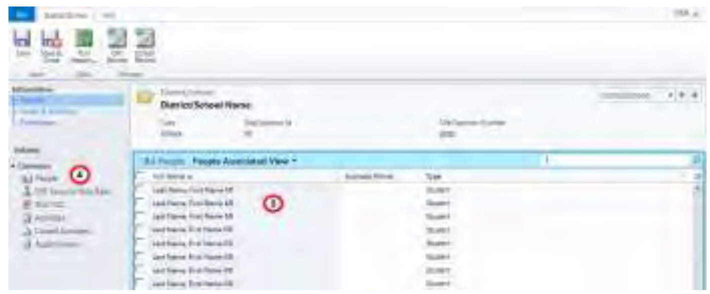
1. On the left Navigation Pane, click **District/School** to display a list of district and/or school records pre-filtered by the view selected in the View Selector
2. Use the View Selector to select District/Schools | Active Districts
3. Double click on an individual record (avoiding any hyperlinks) to open from the List Pane
4. From the District record, select **Schools** from the left Navigation Pane
5. Optionally, double click on an active School record to open the record from the displayed list



Display People records that are associated with a School Record

1. On the left Navigation Pane, click **District/School** to display a list of district and/or school records pre-filtered by the view selected in the View Selector
2. Use the View Selector to select District/Schools Active Schools
3. Double click on an individual record (avoiding any hyperlinks) to open from the List Pane
4. From the District record, select **People** from the left Navigation Pane
5. Optionally, double click on an active Person record to open the record from the displayed list



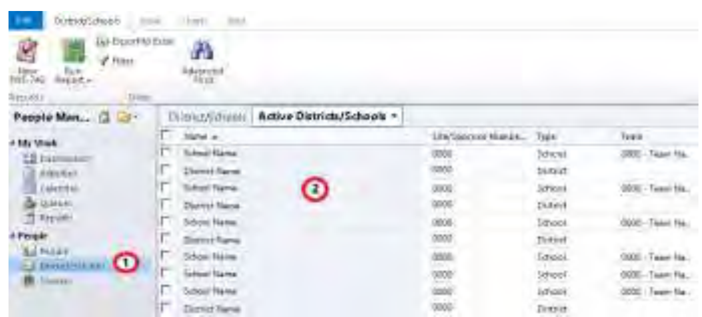


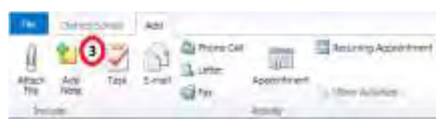
Add a Note to a District/School record

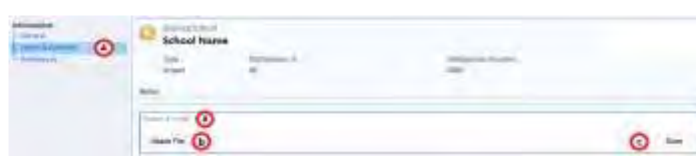
Users can add a Note to the District or School record two different ways:

1. On the left Navigation Pane, click **District/School** to display a list of district and/or school records pre-filtered by the view selected in the View Selector
2. Double click on an individual record (avoiding any hyperlinks) to open from the List Pane
3. Click on the **Add** tab and then click on the **Add Note** button on the top ribbon
   - a. A new Note window will appear, enter a **Note Title** and then enter notes in the space provided below
   - b. The user can optionally attach a file to the note
   - c. When finished, the user will click **Save and Close** at the top of the window
4. Also from the Person record, the user can select **Notes & Activities** from the left Navigation Pane
   - a. Under the **Notes** section, click on "**Enter a Note**" and the user can start typing notes directly in space provided
   - b. The user optionally can click **Attach File** to attach a file to the Note
   - c. When finished, the user will click **Done**

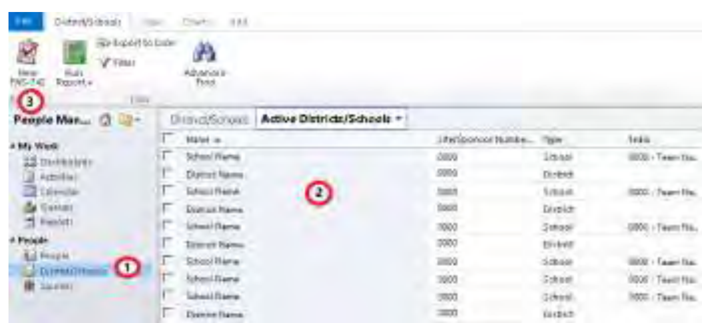
Note: The notes entered by the user will populate the Notes field on the District/School record in the Notes & Activities section. The most recent note will be placed at the top of the box. Each Note will capture the user name that created it as well as the date and time it was created.

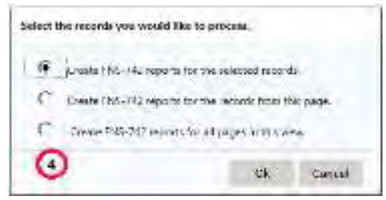


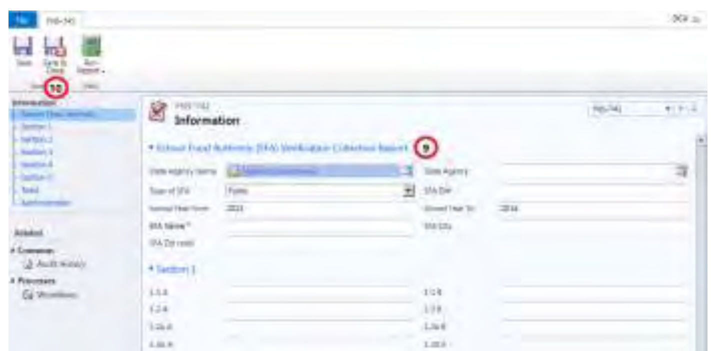




Create a new FNS-742 report record

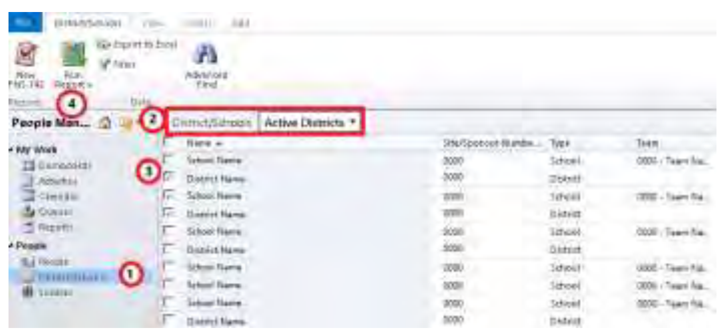






1. On the left Navigation Pane, click **District/School** to display a list of district and/or school records pre-filtered by the view selected in the View Selector
2. Optionally, select an individual record (by placing a checkmark next to the name) or select multiple records by holding the CTRL or SHIFT key
3. Click on the **New FNS-742** button on the top ribbon
4. Use the radio buttons on the popup window to select the records to be processed (selected records only, records from this page, or all pages in this view), then click **OK**
5. Click **OK** on the popup message: "Are you sure you would like to create FNS-742 Reports for the selected records?"
6. Click **OK** on the second popup message: "All records have been processed."
7. Open the District/School record(s) and select **FNS-742** from the left Navigation Pane to display the available FNS-742 records
8. Locate and double click the row (avoiding all hyperlinks) of the newly created FNS-742 record
9. In the new window enter the SFA Verification Collection Report data in the appropriate sections
10. Click the **Save & Close** button on the ribbon when finished

Create a FNS-742 report – DRAFT INSTRUCTIONS ONLY



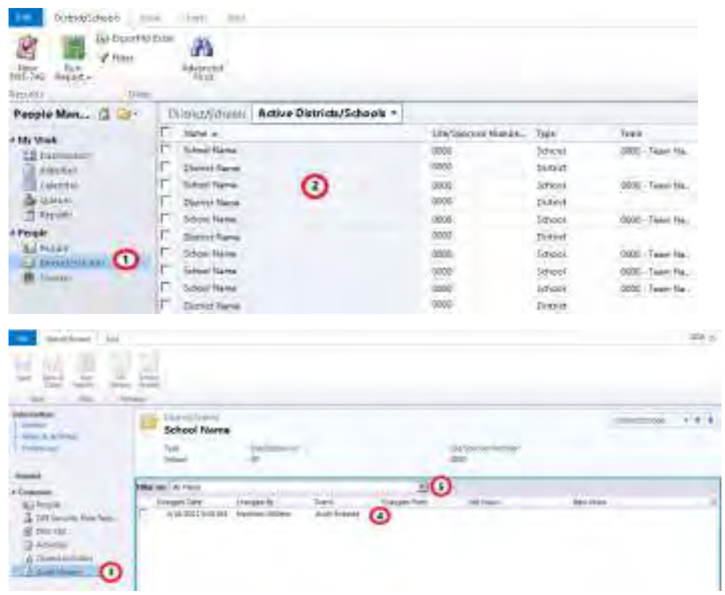
1. On the left Navigation Pane, click **District/School** to display a list of district and/or school records pre-filtered by the view selected in the View Selector
2. Use the View Selector to select District/Schools **Active Districts**
3. Optionally, select an individual district record (by placing a checkmark next to the name) or select multiple records by holding the CTRL or SHIFT key
4. Click on the **Run Report** button on the top ribbon and select FNS-742 in the drop-down menu

- If running FNS-742 report for a single district, report will display most recent record for that district. If running for all district, each district totals will roll-up and provide a yearly total for all districts for the current year.
- Users can print the report by clicking on the printer icon. Users can also save the report in various formats using the disk icon

Audit History – view changes on a District/School record

The **Audit History** function will keep a running history of each change made to a field within a record type. Note: When multiple fields are updated at the same time, they will show up under the same Audit record.

1. On the left Navigation Pane, click **District/School** to display a list of district and/or school records pre-filtered by the view selected in the View Selector
2. Double click on an individual record (avoiding any hyperlinks) to open from the List Pane
3. Select **Audit History** from the left Navigation Pane
4. Optionally, double click on the audit record to display expanded details of the audited changes
5. Optionally, use the **Filter on** drop-down list to filter audit records for a particular field.



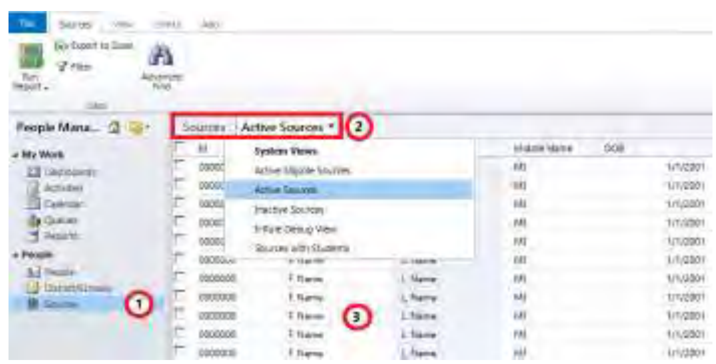
Source Records (Eligibility Source)

Display and open various Eligibility Source views

Such as Active Sources (Default View), Active Eligible Sources, Inactive Sources, and Sources with Students

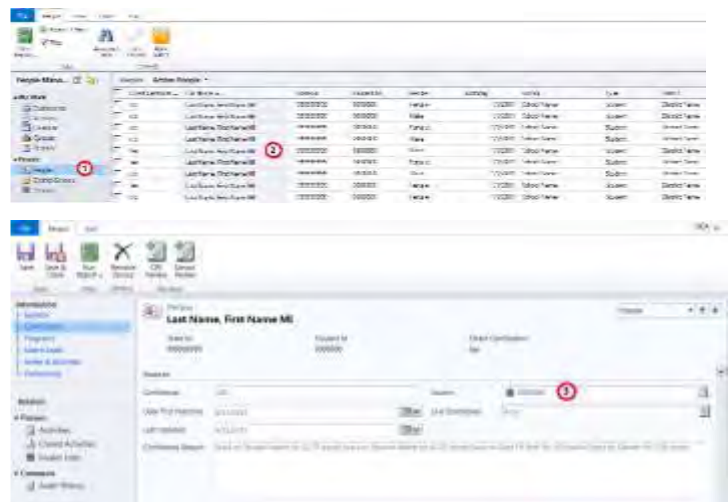
1. On the left Navigation Pane, click **Sources** to display a list of Eligibility Source records pre-filtered by the view selected in the View Selector
2. Use the View Selector to change the current Sources view
3. Double click on an individual record (avoiding any hyperlinks) to open from the List Pane

- Note: The following fields are displayed in the Source record header:
  - ID
- The following fields are displayed in the Source record General Section:
  - First Name, Middle Name, Last Name, Source, Suffix, DOB, Gender, Age, Race, Ethnicity



Open and display a Source record from a Person record

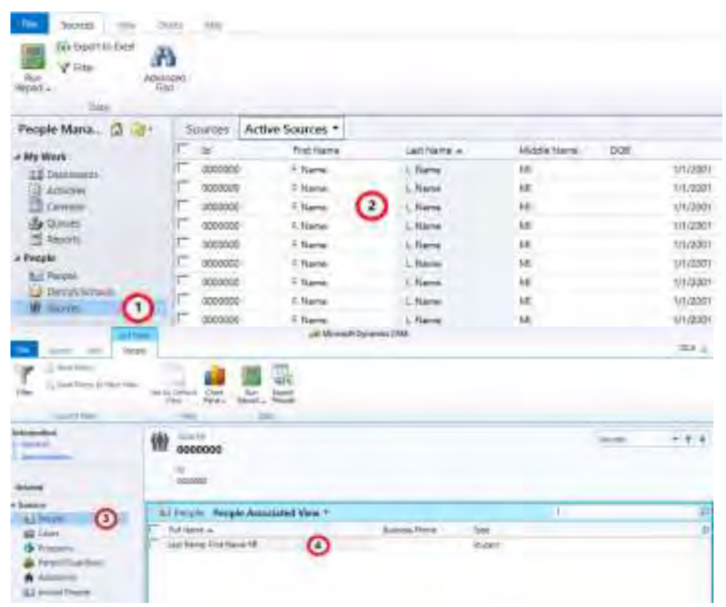
1. On the left Navigation Pane, click **People** to display a list of students records pre-filtered by the view selected in the View Selector
2. Double click on an individual record (avoiding any hyperlinks) to open from the List Pane
3. Under the Sources section, click on the **Source** hyperlink



Display People records that are associated with a Source record

1. On the left Navigation Pane, click **Sources** to display a list of Eligibility Source records pre-filtered by the view selected in the View Selector
2. Double click on an individual record (avoiding any hyperlinks) to open from the List Pane
3. From the Sources record, select **People** from the left Navigation Pane
4. Optionally, double click on an active Person record to open the record from the displayed list

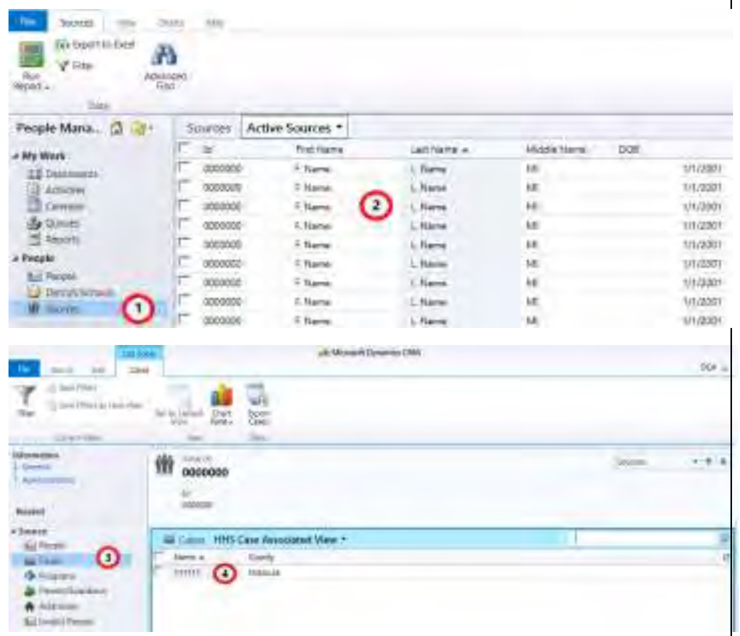
- Note: Users will only see Person records for which they have permissions to view.



Display Case records that are associated with a Source record

1. On the left Navigation Pane, click **Sources** to display a list of Eligibility Source records pre-filtered by the view selected in the View Selector
2. Double click on an individual record (avoiding any hyperlinks) to open from the List Pane
3. From the Sources record, select **Cases** from the left Navigation Pane
4. Optionally, double click on an active Case record to open the record from the displayed list

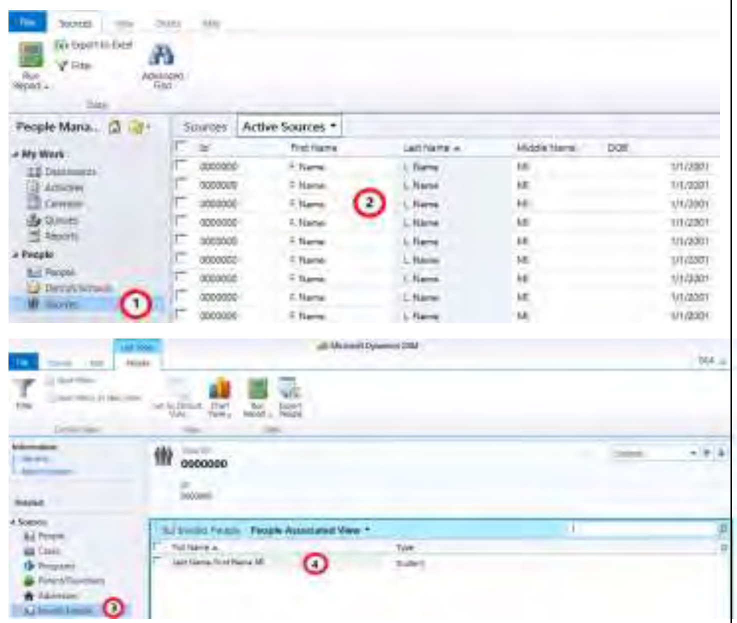
- Note: Users will see the following information displayed in a Case record:
  - Linked Source Records
  - Parent/Guardian Relationships
  - Open Programs such as SNAP and TANF
  - Addresses
- Users can also access the records displayed in a Case from the left Navigation Pane of the Source record



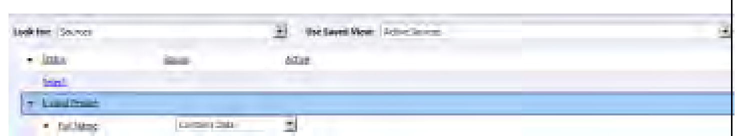
Display Invalid People that are associated with a Source record

1. On the left Navigation Pane, click **Sources** to display a list of Eligibility Source records pre-filtered by the view selected in the View Selector
2. Double click on an individual record (avoiding any hyperlinks) to open from the List Pane
3. From the Sources record, select **Invalid People** from the left Navigation Pane
4. Optionally, double click on an Invalid Person record to open the record from the displayed list

- Note: Invalid People records that are no longer a potential match for the Source record are displayed in a List Pane.
- Users will only see Invalid Person records for which they have permissions to view.



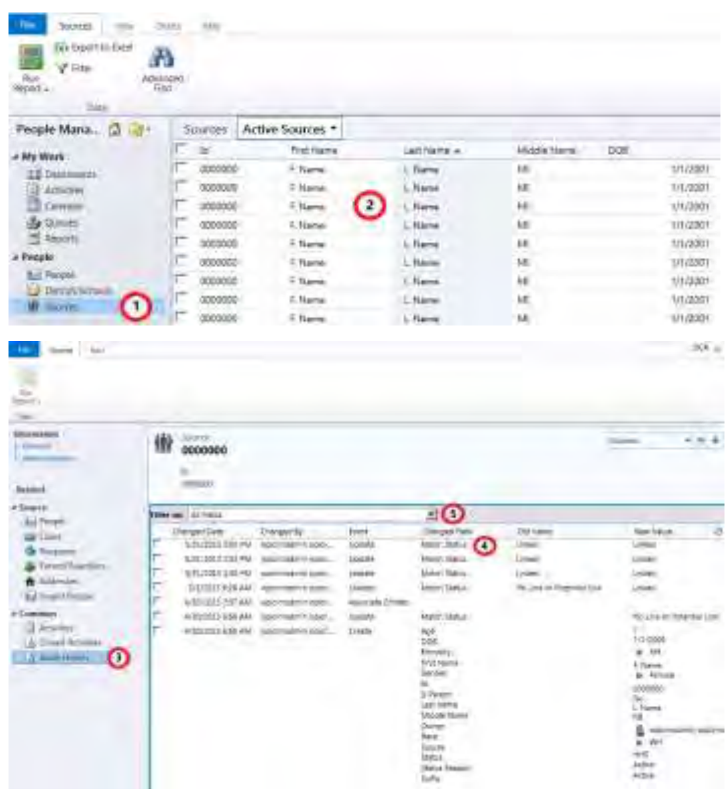
Advanced Find search criteria that can be used to located **Invalid People** records:



Audit History – view changes on a Source record

The **Audit History** function will keep a running history of each change made to a field within a record type. Note: When multiple fields are updated at the same time, they will show up under the same Audit record.

1. On the left Navigation Pane, click **Sources** to display a list of Eligibility Source records pre-filtered by the view selected in the View Selector
2. Double click on an individual record (avoiding any hyperlinks) to open from the List Pane
3. Select **Audit History** from the left Navigation Pane
4. Optionally, double click on the audit record to display expanded details of the audited changes
5. Optionally, use the **Filter on** drop-down list to filter audit records for a particular field.



Activities

Activities are recorded and tracked daily interactions such as emails, appointments, phone calls, tasks, etc. Weekly Notifications are displayed in the Dashboard as Activities.

Display open Activities (and weekly notifications) and mark as complete

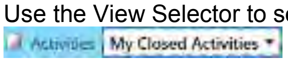
1. On the left Navigation Pane, click **Dashboards** to display a list of Activities pre-filtered by the view selected in the View Selector
2. Click inside the Activities List Pane that is displayed (The Activities List Pane will be outlined in blue)
3. Double click on an individual activity (avoiding any hyperlinks) to open from the List Pane. Review the activity details and/or weekly notifications and act on the information as necessary.

- Weekly Activities are automatically created by CRM as a Task to alert users to any weekly changes (such as partial matches, newly linked students, newly certified students, etc.)

4. When finished, click the **Mark Complete** button on the top ribbon to close the activity

View closed Activities

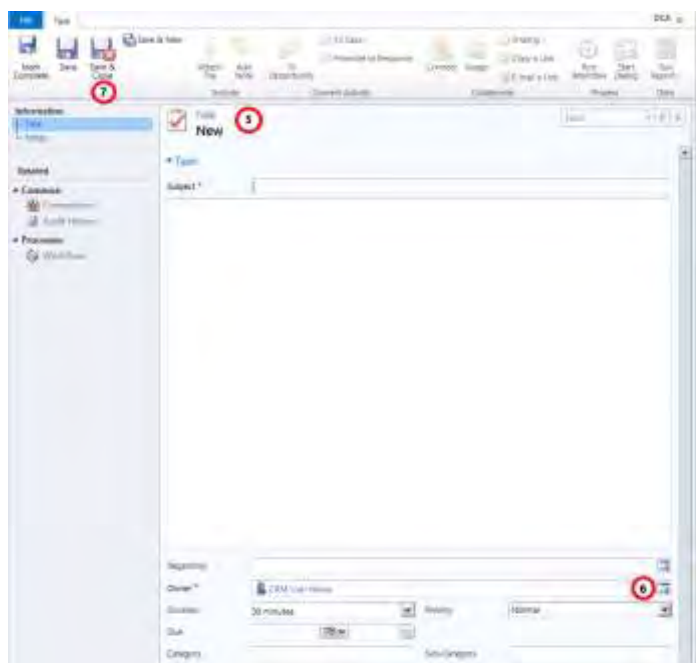
1. On the left Navigation Pane, click **Dashboards** to display a list of Activities pre-filtered by the view selected in the View Selector
2. Click inside the Activities List Pane that is displayed (The Activities List Pane will be outlined in blue)
3. Use the View Selector to select



4. Optionally, double click an activity (avoiding all hyperlinks) to view and display the closed activity.

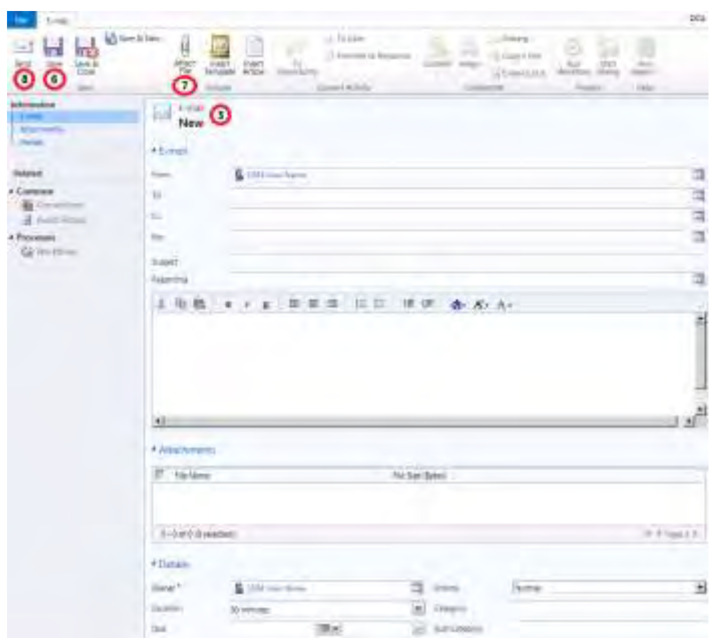
Create a new Task

1. On the left Navigation Pane, click **Dashboards** to display a list of Activities pre-filtered by the view selected in the View Selector
2. Click inside the Activities List Pane that is displayed (The Activities List Pane will be outlined in blue)
3. Click the **New Activity** button on the top ribbon
4. In the new window, select **Task**, and then click **OK**
5. In the new **Task** window complete the appropriate fields (subject, task details, due date, etc.)
6. Optionally, to assign the task to another user, click on the lookup icon in the **Owner** field to select the user responsible for completing this task
7. When finished, click the **Save & Close** button on the top ribbon



Create a new Email

1. On the left Navigation Pane, click **Dashboards** to display a list of Activities pre-filtered by the view selected in the View Selector
2. Click inside the Activities List Pane that is displayed (The Activities List Pane will be outlined in blue)
3. Click the **New Activity** button on the top ribbon
4. In the new window, select **Email**, and then click **OK**
5. In the new **Email** window complete the appropriate fields (recipient, subject, email body, due date, priority, etc.)
6. Click the **Save** button on the top Ribbon
7. Optionally, click on the **Attach File** button on the ribbon to attach a file to the email (Attach File button will not be activated unless previous step is complete.)
8. When finished, click the **Send** button on the top ribbon

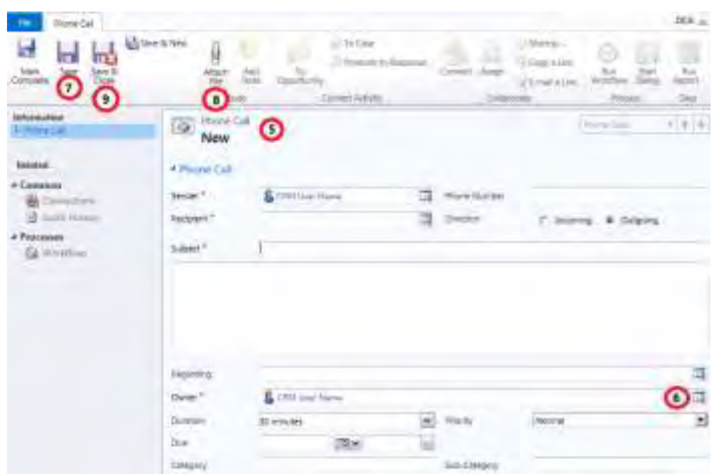


Create a new Appointment

1. On the left Navigation Pane, click **Dashboards** to display a list of Activities pre-filtered by the view selected in the View Selector
2. Click inside the Activities List Pane that is displayed (The Activities List Pane will be outlined in blue)
3. Click the **New Activity** button on the top ribbon
4. In the new window, select **Appointment**, and then click **OK**
5. In the new **Appointment** window complete the appropriate fields (subject, location, appointment details, start date/time, etc.)
6. Use the lookup icon to select Required and Optional participants
7. Click the **Save** button on the top ribbon
8. Optionally, click on the **Attach File** button on the ribbon to attach a file to the email (Attach File button will not be activated unless previous step is complete.)
9. Optionally, click the **Recurrence** button on the top ribbon to set-up recurring scheduling information
10. When finished, click the **Save & Close** button on the top ribbon

Create a new Phone Call

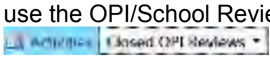
1. On the left Navigation Pane, click **Dashboards** to display a list of Activities pre-filtered by the view selected in the View Selector
2. Click inside the Activities List Pane that is displayed (The Activities List Pane will be outlined in blue)
3. Click the **New Activity** button on the top ribbon
4. In the new window, select **Phone Call**, and then click **OK**
5. In the new **Phone Call** window complete the appropriate fields (recipient, subject, phone call details, due date, etc.)
6. Optionally, to assign the phone call to another user, click on the lookup icon in the **Owner** field to select the user responsible for completing this phone call
7. Click the **Save** button on the top ribbon
8. Optionally, click on the **Attach File** button on the ribbon to attach a file to the email (Attach File button will not be activated unless previous step is complete.)
9. When finished, click the **Save & Close** button on the top ribbon



Display open OPI/School Review Activities and mark as complete

1. On the left Navigation Pane, click **Dashboards** to display a list of Activities pre-filtered by the view selected in the View Selector
2. Use the Dashboard View Selector to select the appropriate System View. Note: Select **DCA** to display a dashboard containing school review activities or **OPI** to display a dashboard containing OPI review activities
3. Click inside the OPI/School Review Activities List Pane that is displayed (The OPI/School Review Activities List Pane will be outlined in blue)
4. Double click on an individual OPI/School Review activity (avoiding any hyperlinks) to open from the List Pane. Review and act on any notifications.
5. When finished, click the Mark Complete button  on the top ribbon to close the activity

View closed OPI/School Review Activities

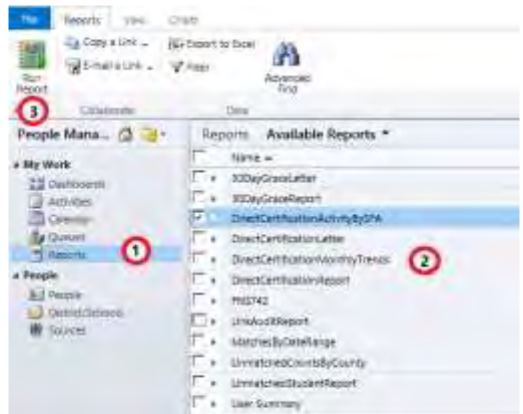
1. On the left Navigation Pane, click **Dashboards** to display a list of Activities pre-filtered by the view selected in the View Selector
2. Use the Dashboard View Selector to select the appropriate System View. Note: Select **DCA** to display a dashboard containing school review activities or **OPI** to display a dashboard containing OPI review activities
3. Click inside the OPI/School Review Activities List Pane that is displayed (The OPI/School Review Activities List Pane will be outlined in blue)
4. use the OPI/School Review View Selector to select  or 
5. Optionally, double click an activity (avoiding all hyperlinks) to view and display the closed activity.

Reports

Reports help users obtain insight into their organization’s data.

Access and run a report

1. On the left Navigation Pane, click **Reports** to display a list of available reports
2. Click on the **Report** name hyperlink
3. OR put a checkmark next to the report name and click the **Run Report** button on the top ribbon
4. Depending on the report select, users may be required to select additional criteria from the available drop down menus, such as Sponsor, Site, or County. (Most drop down menus will allow user to select multiple criteria)
5. Optionally, depending on the report select, users may be able to adjust other criteria, such as Eligibility Source, Match Score, Direct Cert %, Start/End Date, Start/End DOB, etc.
6. Once required selections have been made, click **View Report**
7. In the displayed report, users can print the report by clicking on the printer icon. Users can also save the report in various formats using the disk icon



Charts

With the help of charts, users can graphically represent data. Charts are often displayed on dashboards but can also be displayed "in-line" with list views as well.

View existing charts

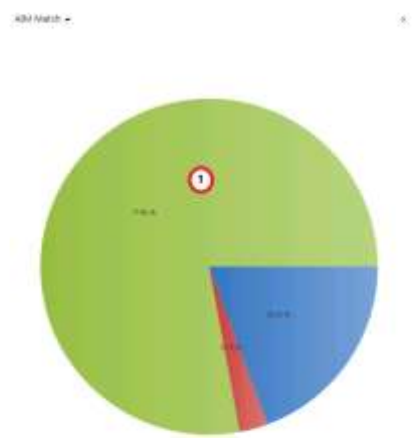
1. On the left Navigation Pane, select a record type (either **People**, **District/Schools**, or **Sources**)
2. Click the **Click here to view the chart** bar on the far right of the screen
3. Click on the **View Selector ▾** next to the chart name to view a drop-down list of the available existing charts.

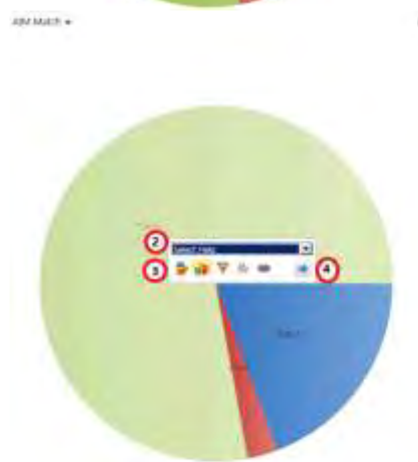
- There are two type of charts available to be displayed:
    - **System Charts**: are created by the System Administrator and are accessible to all CRM users
    - **User Charts**: are created by and only accessible to the user
- When the view is changed or a filter applied to the data in a List Pane, the chart is updated accordingly.

Drill down into the chart data

1. From a displayed chart, click in the category area of the chart in which you want to drill down further
2. In the popup shortcut menu, click **Select Field**, and then select the field from the drop down menu by which you want to group the category.
3. Optionally, click the corresponding icon for a chart type in which the data is needed.
4. Click the blue arrow icon to perform drill down (blue arrow icon will not be active until you select field in previous step)

- Users can drill down even further on the resulting chart by repeating the previous few steps
- After drilling down, user can click the blue arrow icon located at the bottom left of the chart window to go back once or click the home button to go back to the original chart





Create a new personal chart

1. On the left Navigation Pane, select a record type (either **People**, **District/Schools**, or **Sources**)
2. Click the **Charts** tab in the ribbon menu.
3. Click the **New** Chart button.
4. Select the chart type on the top ribbon
5. In the **Chart Designer** window, enter a **Name** for the Chart
6. Select a field for the **Legend Entries (Series)**
7. Select an **Aggregate** for the field. The aggregation drop-down is dynamically populated based upon the data type of the field selected in the ***Legend Entries (Series)*** field.
8. Optionally, click on the **Chart** icon to change the Chart type
9. Optionally, click on the **Top/Bottom Rules** icon to select Top X Rule, Bottom X Rule or Clear Rules
10. Optionally, click on the green plus sign to add additional series Add a series
11. Select a Category from the **Horizontal (Category) Axis Labels** drop-down (Once the category is selected, CRM renders a preview of what the chart will look like within the application.)
12. Optionally, click on the green plus sign to add additional categories Add a category
13. When finished, click the **Save & Close** button Save & Close on the top ribbon

- To modify a chart, click on the **Chart** tab on the top ribbon, and then click the **Edit Chart** button Edit Chart. The **Chart Designer** window will open where changes can be made.

To modify a personal chart:

Dashboard

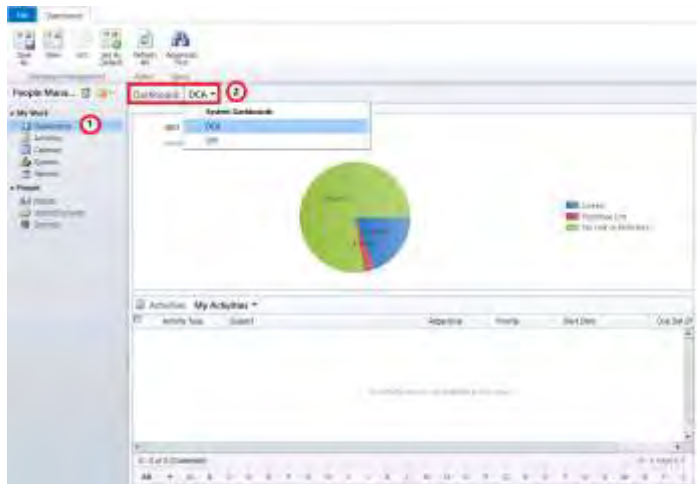
At a glance, **dashboards** give users a quick overview of all the information considered important in CRM.

In a single place, dashboards can give users a summary of data such as the percentage (or count) of matched AIM students and DPHHS eligibility sources or whether or not they are on track with their daily activities.

View existing dashboards

1. On the left Navigation Pane, select **Dashboards**
2. Optionally, click on the Dashboard View Selector to toggle between available Dashboard Views

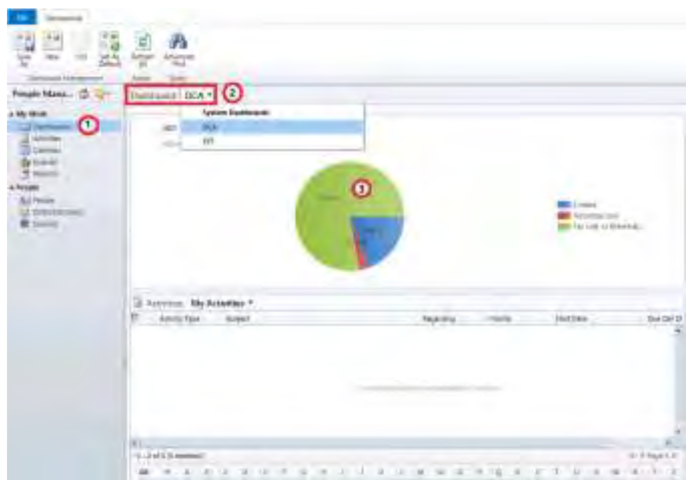
- There are two type of dashboards available to be displayed:
    - **System Dashboards**: are created by the System Administrator and are accessible to all CRM users
    - **User Dashboards**: are created by and only accessible to the user



Drill down into a chart located on a dashboard

1. On the left Navigation Pane, select **Dashboards**
2. Optionally, click on the Dashboard View Selector to toggle between available Dashboard Views
3. From the displayed chart, click in the category area of the chart in which you want to drill down further
4. In the popup shortcut menu, click **Select Field**, and then select the field from the drop down menu by which you want to group the category.
5. Optionally, click the corresponding icon for a chart type in which the data is needed.
6. Click the blue arrow icon to perform drill down (blue arrow icon will not be active until you select field in previous step)

- Users can drill down even further on the resulting chart by repeating the previous few steps
- After drilling down, user can click the blue arrow icon located at the bottom left of the chart window to go back once or click the home button to go back to the original chart



Additional dashboard chart features

1. To enlarge a chart, click on the enlarge chart icon
2. To refresh a chart, click on the refresh icon
3. To view the data used to generate the chart, click on the view records icon

- Icons appear in the upper right corner of a chart window once a user clicks inside the chart window

Dashboard list pane features

1. On the left Navigation Pane, click **Dashboards**
2. Click inside a Dashboard List Pane (The List Pane will be outlined in blue) and the top ribbon automatically adapts to the Activities tab with buttons that are specific to actions users can perform on Activities within the List Pane

- Buttons available on the Activities ribbon include: filter, mark complete, and create new activity
- For additional information on weekly notifications, creating a new activity, marking an activity as complete, or OPI/School review activities – please see the **Activities** portion of this document.

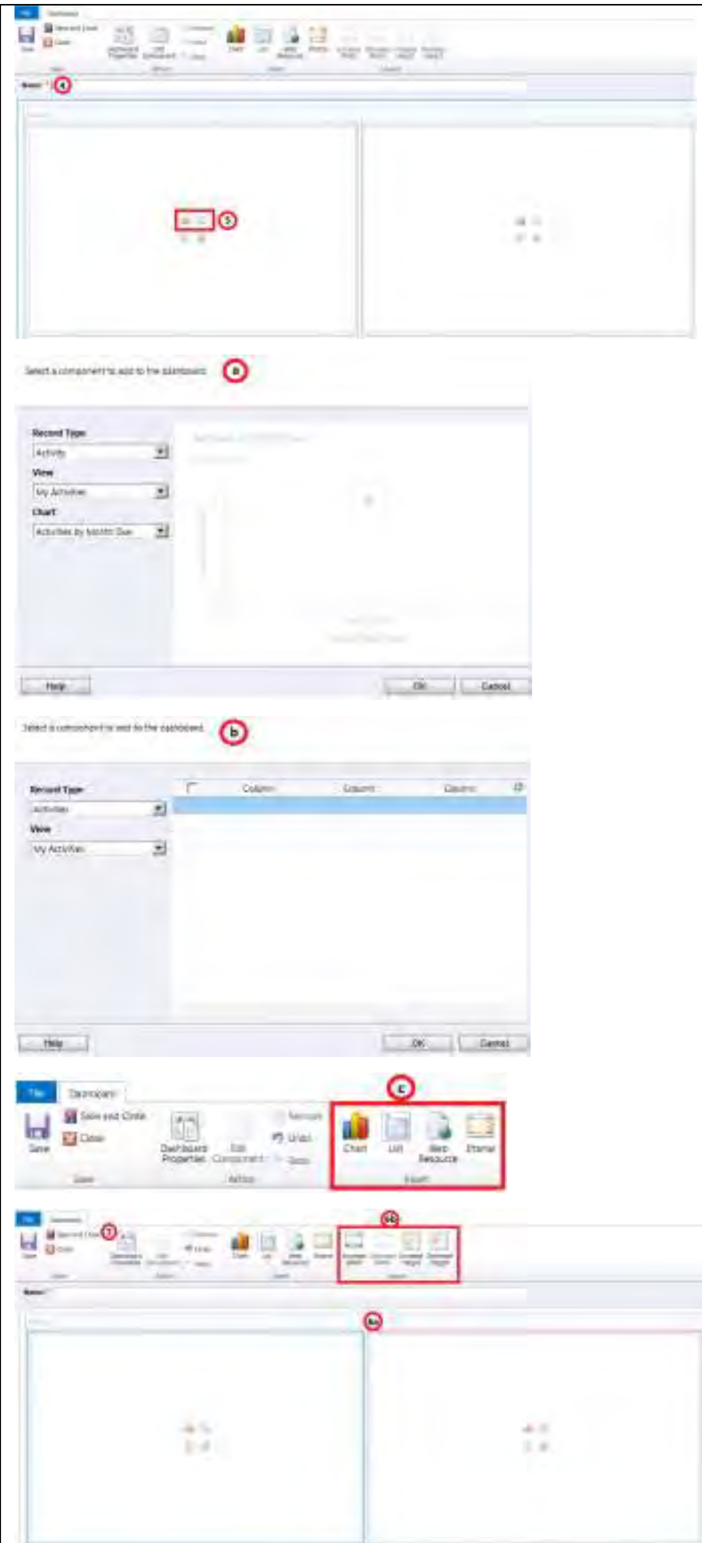
Create a new personal dashboard

If it is not already available in CRM, create any necessary components that you want to add to the personal dashboard before starting. (Additional views can be created through **Advanced Find** queries and **Charts** can be created directly from the record type.)

1. On the left Navigation Pane, click **Dashboards**
2. Click the **New** button New on the top ribbon
3. In the **Dashboard Layouts** dialog box, select one of the available layouts and then click **Create**
4. In the **New Dashboard** window, enter an descriptive **name** for the dashboard
5. In each of the dashboard sections, select the appropriate icon for the component to be added (Chart, View)
   a. If Chart is selected, use the drop-down menus to select the **Record Type**, **View** and **Chart** to add
   b. If List is selected, use the drop-down menus to select the **Record Type** and **View** to add
   c. Additional components can be added from the **Insert** section of the ribbon. Users can insert up to a total of six components in any layout.
6. The components can easily be rearranged and resized:
   a. To rearrange the components already added, click on the component header and **drag** it to an empty area on the dashboard or to the area of an existing component. When the component is drug over other components, a **red line** appears on top of the components to show that if dropped here, the existing component will move down.

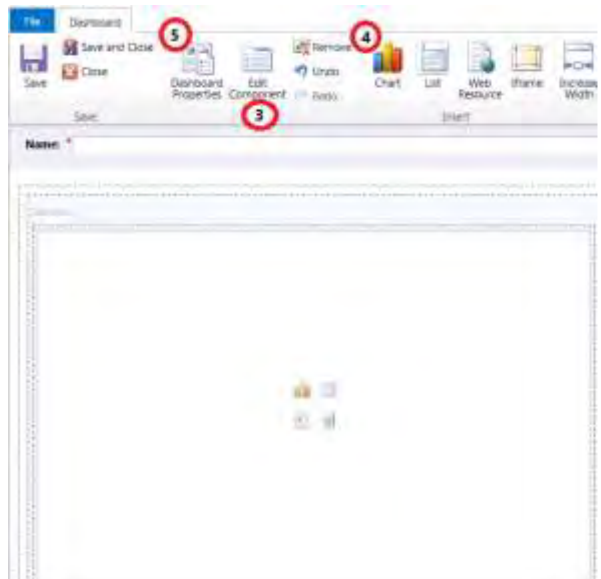
b. To adjust the width and height of each section, select **Increase Width**, **Decrease Width** or **Increase Height**, **Decrease Height** from the top ribbon.

7. Once the dashboard is looking right, click the **Save and Close** button Save and Close on the ribbon.



Modify a personal dashboard

1. On the left Navigation Pane, click **Dashboards** and use the Dashboard View selector to select the personal dashboard to modify
2. Click the **Edit** button Edit on the top ribbon
3. To modify a component that has been added to the dashboard, select the component, then click the **Edit Component** button Edit Component on the top ribbon, and then make changes as required.
4. To remove a component from the dashboard, click the **Remove** button Remove on the top ribbon.
   - When a component has been removed, a new component cannot be added in the same place. A new component is added in the bottom area of the designer. The user can rearrange the components at any time after it is inserted to the dashboard.
5. When edits are complete, click the **Save and Close** button Save and Close on the top ribbon.

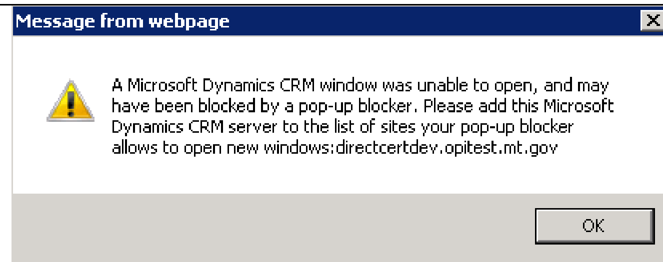
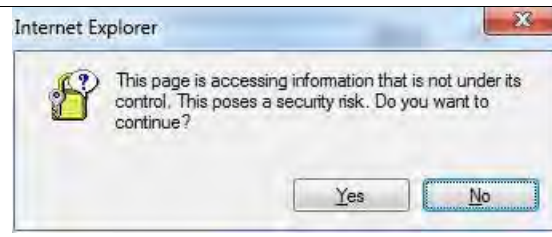


Set personal dashboard as a default

1. On the left Navigation Pane, click **Dashboards**
2. Use the Dashboard View selector to select the personal dashboard to modify
3. Click the **Set As Default** button Set As Default on the top ribbon

Fixes for Known Internet Explorer Issues

From time to time, users may receive an error. Below are the errors that have been logged to-date and how to fix.

To fix this error: 1. In Internet Explorer, click on **Settings** and select **Internet Options** from the drop down menu 2. Go to the **Privacy** tab 3. Under **Pop-up Blocker**, click **Settings** 4. Enter the **CRM URL,** click **Add** and then click **Close** 5. Go to the **General** tab 6. Under **Browsing History**, click **Delete** 7. Uncheck Preserve Favorites website data and check all other boxes (except Form data and Password) and then click **Delete** 8. Once it has finished deleting, close all open Internet Explorer windows then open Internet Explorer again and the issue should be fixed	
To fix this error: 1. In Internet Explorer, click on **Settings** and select **Internet Options** from the drop down menu 2. Go to the **Security** tab 3. Click on **Trusted Sites** 4. Click on the **Sites** button 5. Enter the **CRM URL,** click **Add** and then click **Close** 6. Go to the **General** tab 7. Under **Browsing History**, click **Delete** 8. Uncheck Preserve Favorites website data and check all other boxes (except Form data and Password) and then click **Delete** 9. Once it has finished deleting, close all open Internet Explorer windows then open Internet Explorer again and the issue should be fixed	
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